

CRM ACTIVITIES

TODAY'S ACTIVITIES

This is a list of Activities that are due **today**, that you can follow up on and action directly.

As you work through your activities and complete them, they will be **removed** from the list.

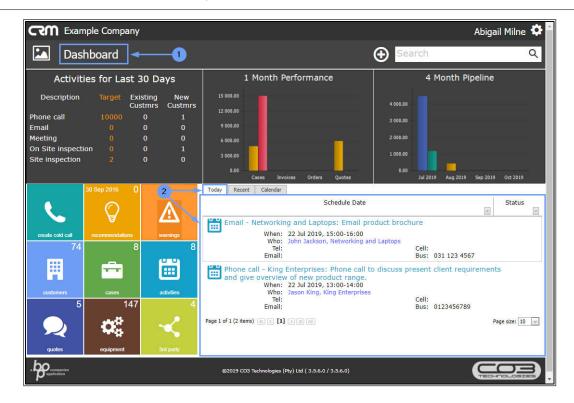
All activities that were due on the current day, but <u>not</u> actioned, will show up in your Warnings the following day.

Ribbon Access: Webpage > http://[servername]:[port-no]/BPOCRM/User.aspx

SELECT THE TODAY TAB

- 1. In the *Dashboard* (Home page) screen,
- 2. Ensure that the *Today* tab is selected to be able to view the day's activities.

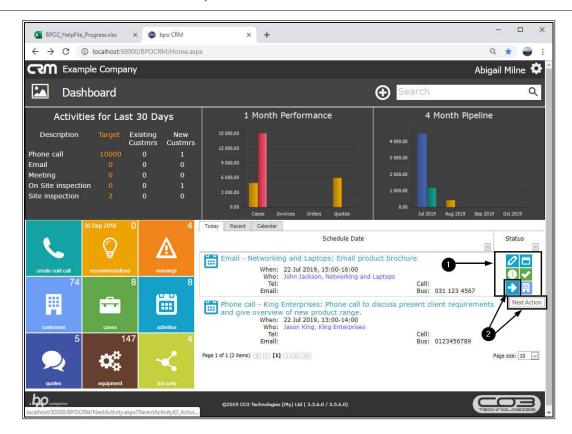




DISPLAY THE ACTION BUTTONS

- 1. Hover over an activity to display *Action* buttons:
 - View / Edit this Activity
 - Reschedule this Activity
 - View Case info and history
 - Close this case
 - Next Action (close current activity and create new activity)
 - View customer
- 2. Hover over any of these to bring up a **button description** text box.

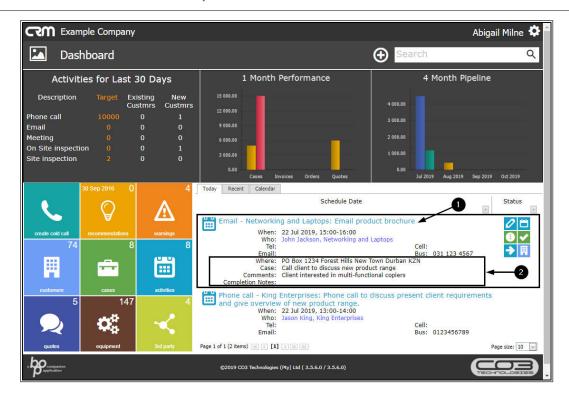




ACTIVITY QUICK VIEW SUMMARY

- 1. Single click on any activity in this screen,
- 2. To access a *quick view summary* of the activity information.





NAVIGATE TO CUSTOMER DASHBOARD

• Click on the blue link in the *Who* field of any of the activities.





- 1. The selected *Customer Dashboard* screen will be displayed.
- 2. Here you can view the *Customer / Company details* and *12 Months Sales History*.
- 3. A panel of *Links* tiles can direct you to further information regarding this customer.





CRM.001.001